

CLAIMS

What is claimed is:

1. A method for organizing and presenting information from a client account database, and for preparing briefing packages for sales account executives,
5 said database storing a plurality of client records each containing data or links to data relating to a different customer, said method comprising the steps of:
 showing a first set of information for a selected client account on a main screen view on a user display; and
 providing user-selectable expandable subforms and hyperlinks to
10 additional information for said selected client account.
2. The method as set forth in Claim 1 wherein said step of showing a first set of information comprises showing an physical address for a selected client account.
3. The method as set forth in Claim 1 wherein said step of showing a first set of
15 information comprises showing a stock trading symbol for a selected client account.
4. The method as set forth in Claim 1 wherein said step of showing a first set of information comprises showing a home page web address for a selected client account.
- 20 5. The method as set forth in Claim 1 wherein said step of providing user-selectable hyperlinks comprises providing at least one hyperlink to a word processor document.

6. The method as set forth in Claim 1 wherein said step of providing user-selectable hyperlinks comprises providing at least one hyperlink to a web page.
7. The method as set forth in Claim 1 wherein said step of providing user-selectable hyperlinks comprises providing at least one hyperlink to a computer-readable presentation file.
8. The method as set forth in Claim 1 wherein said step of providing user-selectable hyperlinks comprises providing at least one hyperlink to an action item list.
9. The method as set forth in Claim 1 wherein said step of providing user-selectable hyperlinks comprises providing at least one hyperlink to a biographical account of an employee for a selected client account.
10. A computer process comprising a computer program embodied in a computer-readable medium for organizing and presenting information from a client account database, and for preparing briefing packages for sales account executives, said database storing a plurality of client records each containing data or links to data relating to a different customer, said computer program being performed on or with aid of a computer and including:
- (a) first code means for causing the computer to show a first set of information for a selected client account on a main screen view on a user display; and

(b) second code means for causing the computer to provide user-selectable hyperlinks and expandable subforms to additional information for said selected client account.

11. The computer process as set forth in Claim 10 wherein said second code
5 means which provides user-selectable hyperlinks comprises code means for causing the computer to show word processor files.
12. The computer process as set forth in Claim 10 wherein said second code means which provides user-selectable hyperlinks comprises code means for causing the computer to show computer-readable presentation files.
- 10 13. The computer process as set forth in Claim 10 wherein said second code means which provides user-selectable hyperlinks comprises code means for causing the computer to show Rich Text Format information.
14. The computer process as set forth in Claim 10 wherein said second code means which provides user-selectable hyperlinks comprises code means for
15 causing the computer to display biographical information concerning at least one employee of a selected client company.
15. The computer process as set forth in Claim 10 wherein said second code means which provides user-selectable hyperlinks comprises code means for causing the computer to display a stock quote for a selected client company.
- 20 16. The computer process as set forth in Claim 10 wherein said second code means which provides user-selectable hyperlinks comprises code means for

causing the computer to display a web home page for a selected client company.

17. A system for organizing and presenting information from a client account database, and for preparing briefing packages for sales account executives,
5 said system comprising:

a storage device for storing a plurality of client records, said client records each containing data or links to data relating to a different customer,

a first program code means executable by a database server computer for showing a first set of information for a selected client account on a main
10 screen view on a user display; and

a second code means executable by a database server computer for providing user-selectable expandable subforms and hyperlinks to additional information for said selected client account.

18. The system as set forth in Claim 17 wherein said second code means
15 comprises code means for causing the computer to show word processor files.

19. The system as set forth in Claim 17 wherein said second code means comprises code means for causing the computer to show computer-readable presentation files.

20. The system as set forth in Claim 17 wherein said second code means
20 comprises code means for causing the computer to show Rich Text Format information.

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